North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Enrollment Portal

Organization Administrator User Guide

Version 6

March 9, 2021







If you have any questions, issues or requests, please go to the

CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm vaccine

If you are in North Carolina, you can also call the COVID-19 Provider Help Center

at (877) 873-6247 and select option 8. The COVID-19 Provider Help Center

is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday - Sunday: 10:00 AM - 6:00 PM ET

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

- 1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
- 2. Populate your first name, last name, business e-mail, and your registration code

 NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your

 Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina

 Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

 For providers who are not enrolled or may not have a Provider PIN you may use the following generic Provider PIN to register.
 - For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021
- 3. You will receive an e-mail with your username and temporary password to log into the portal



^{*} On the home page of the CVMS Help Desk Portal, select the "Vaccine Provider" option to submit your question, issue, or request.

Table of Contents

	Pages
Provider Enrollment Process Overview	5 – 8
Completing Section A	9 – 19
Steps After Completing Section A	20 – 24
Checking the Registration Status of a Location	25 – 27
Appendix	28-31



Overview

Section A

Welcome to the NCDHHS Provider Enrollment Portal in the COVID-19 Vaccine Management System (CVMS). Please read the following instructions before enrolling your organization.

As an Organization Administrator, you are about to complete Section A of the CDC COVID-19 Vaccination Program Provider Agreement and CDC Supplemental COVID-19 Vaccine Redistribution Agreement (if applicable), which gathers information on your organization. To complete this section, you will be asked for:

- Organization details
- Organization Administrator contact details
- Location(s) administering vaccinations
- Information about your Executive Officers (CMO and CEO)

You must add all locations within your organization that will administed the COVID-19 vaccine. Each location is represented by a Vaccine Coordinator. The Vaccine Coordinator will enter location-specific details when completing Section B of the agreement.

If you also serve as the Vaccine Coordinator for a location within your organization, click on '<u>Locations</u>' at the top of menu bar after you have completed Section A.

If you also serve your organization as its CEO and/or CMO, click on the "CEO Review/Sign" and/or "CMO Review/Sign" at the top menu bar after you have completed Section A to review the conditions for enrollment and provide your signature.

Please note, although you have access to both the CEO and CMO review and signature pages, this section is designated only for the CEO and CMO of your organization. The CEO and CMO will be

Don't Show this Again

Close

In this user guide, we will discuss how to complete Section A of the Provider Enrollment process in the CVMS Provider Enrollment Portal.

The content included in this user guide is for the following role: **Organization Administrator**

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Edge Chromium, or Safari browsers
- Log into the CVMS Provider Enrollment Portal (https://covid-enroll.ncdhhs.gov/)

Now, let's get started!

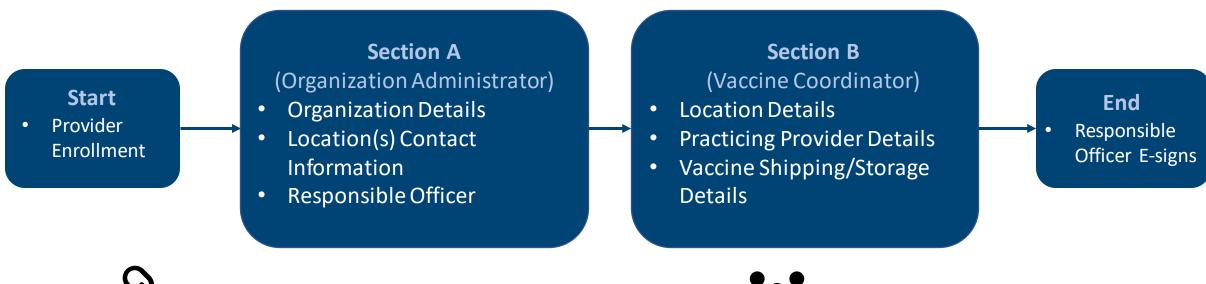


Provider Enrollment Process Overview



CVMS Provider Enrollment Process Overview

The COVID-19 Vaccination Program Provider Enrollment Process takes place in the **CVMS PROVIDER ENROLLMENT PORTAL**. The CVMS Provider Enrollment Portal is a cloud-based solution.



- Additional Resources

 Provider Enrollment Portal https://covid-enroll.ncdhhs.gov/
- Provider Enrollment Checklist <u>COVID-19 Vaccine Management</u>
 System (CVMS) | NC DHHS COVID-19



Relevant Roles

- Organization Administrator
- Vaccine Coordinator
- Responsible Officer (CEO and CMO)

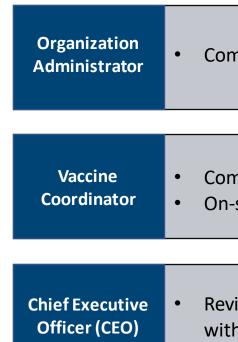


Provider Enrollment Roles

A provider is anyone who provides and administers healthcare services.



- Pharmacies
- Community health centers
- Hospitals
- Clinics
- Long-term care facilities
- Acute care hospitals
- Urgent care clinics
- Other medical care facilities



• Completes Section A for the entire organization.

- Completes Section B for their assigned location(s)
- On-site at the location

Reviews and signs on behalf of all locations within the organization

Chief Medical Officer (CMO)

Reviews and signs on behalf of all locations within the organization



Provider Enrollment Role Checklist

COMPLETE THE CHECKLIST below for **EACH ROLE** that you serve in your organization

Organization Administrator

- Register for a Provider Enrollment account
- Mark if your organization is a Redistribution Participant
- Add all locations
- Add your organization's **CMO**
- ☐ Add your organization's **CEO**

Vaccine Coordinator

- Register for a Provider Enrollment account via the link in the welcome email
- ☐ Upload pictures of the interior and exterior of your storage units
- ☐ Input all practicing providers at your location

For locations with at least 25 practicing providers:

- Request & return the Provider Bulk
 Upload Template to the CVMS Help
 Desk Portal
 - at https://ncgov.servicenowservices.com/csm_vaccine
- Review and sign the CDC COVID-19Vaccination Program ProviderAgreement
- Review and sign the Storage and Handling Attestation

Chief Executive Officer (CEO)

- Register for a Provider Enrollment account via the link in the welcome email
- ☐ Review and sign the CDCCOVID-19 VaccinationProgram Provider Agreement
- If applicable, review and sign the CDC Supplemental COVID-19 Vaccine Redistribution Agreement

Chief Medical Officer (CMO)

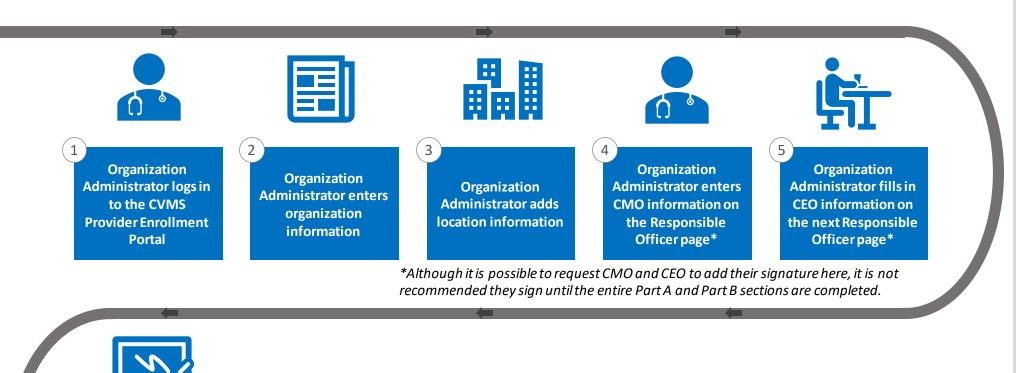
- Register for a Provider
 Enrollment account via the link in the welcome email
- ☐ Review and sign the CDCCOVID-19 VaccinationProgram Provider Agreement
- ☐ If applicable, review and sign the CDC Supplemental COVID-19 Vaccine Redistribution Agreement



Completing Section A



Provider Enrollment Workflow – Section A



Audience

Organization Administrator

Vaccine Coordinator

CEO

CMO

Time Estimate

<20 minutes to enter information</p>

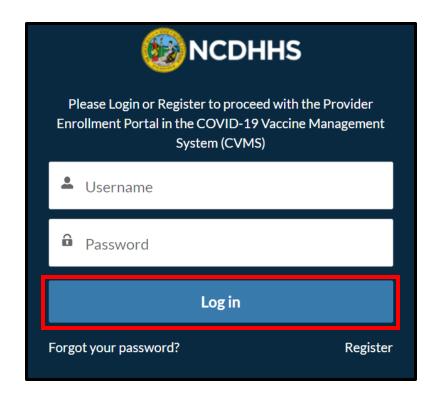
If approved or rejected, an email notification will be generated. Rejected statuses will generate an email with the Reason for Rejection. If not, check spam/junk folder for an email from COVIDenroll@dhhs.nc.gov



Organization
Administrator can
modify submission
after agreement

approval by State

Step 1 of 9: Log into the CVMS Provider Enrollment Portal



When you are ready to begin the Provider Enrollment process, navigate to the CVMS Provider Enrollment Portal.

- 1. Enter your **USERNAME**
- 2. Enter your **PASSWORD**
- 3. Click LOG IN
- 4. After clicking log in, you will be directed to **COMPLETE SECTION A**

Reference the CVMS Provider Enrollment Account
Registration and Password Reset User Guide for more
information about account creation, which is available on
the NC Immunization Branch website at CVMS User Guides,
Recorded Trainings and Upcoming Trainings | NC DHHS
COVID-19

Audience

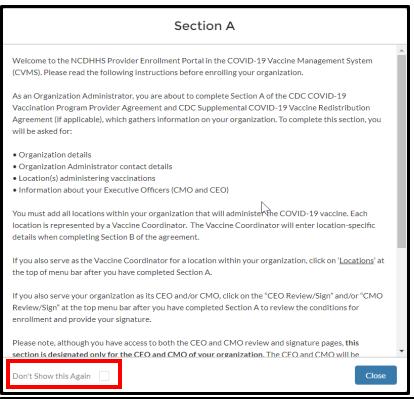
Organization Administrator

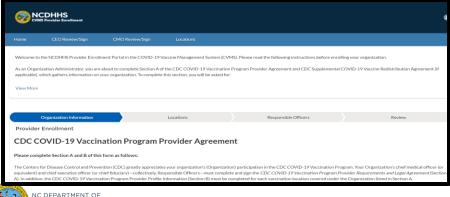
Tips

The link to the CVMS
Provider Enrollment Portal is
https://covid-enroll.ncdhhs.gov/



Step 2 of 9: Collect Key Details Before Beginning Section A



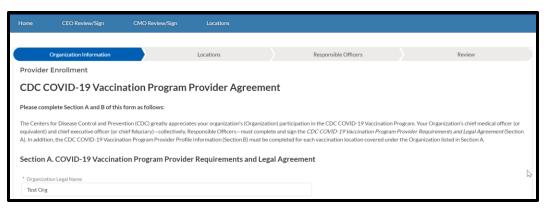


After logging in, you will see a message reminding you of the details you will need to complete **SECTION A**:

- Organization Details
- Organization Administrator Contact Details
- Location(s) administering vaccination
- Information about your Executive Officers (CEO / CMO)
- 1. COLLECT THESE DETAILS beforehand
- 2. CLOSE the window
- 3. You will be directed to Section A.

Audience

Step 3 of 9: Enter Your Organization Details





Once you begin Section A, you will be prompted to enter your **organization details** and indicate if your **organization is a redistribution participant**.

- 1. Populate ALL REQUIRED ORGANIZATION

 DETAILS
- If your organization is a redistribution participant, select YES next to REDISTRIBUTION
 PARTICIPANT
- 3. If you select Yes, your CEO and CMO will be required to SIGN AN ADDITIONAL AGREEMENT indicating that they have reviewed the submitted information and signed the redistribution agreement.
- 4. Review all details entered
- 5. Click **NEXT**

Audience

Organization Administrator

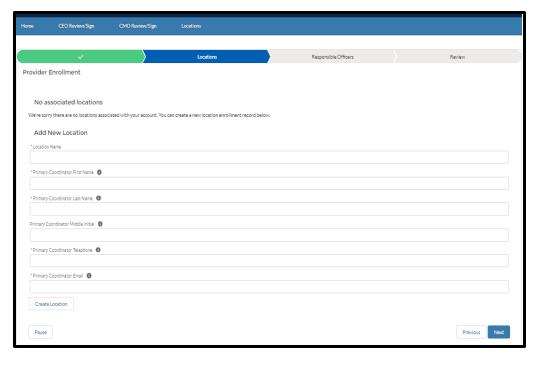
Tips

You can pause and save your progress at any point before submitting Section A.

If you pause, you must logout before logging in and continuing your session.



Step 4 of 9: Add Your Location(s) Details



After entering your organization's details, you will now be able to **ADD ONE OR MORE LOCATIONS** and their respective details.

On this page, you will see a list of **PENDING AND APPROVED LOCATIONS.**

- Complete the information for the FIRST LOCATION
 in the organization
- 2. Click CREATE LOCATION
- 3. You will see the location details appear in the list of **PENDING LOCATIONS**
- 4. Repeat this process for each location you wish to add
- 5. Click **NEXT**

Audience

Organization Administrator

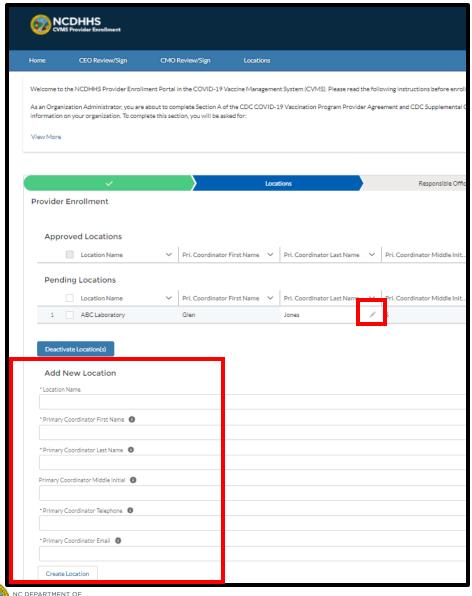
Tips

All locations within an organization must have the same CMO and CEO.

If a location has a different CMO or CEO, a unique Organization Administrator representing the organization will have to complete a separate Section A.



Step 5 of 9: Edit Your Location(s) Details



After adding a location, you are able to edit and update the information.

- 1. Locate the **LOCATION** you wish to edit
- 2. Click the **PENCIL ICON** next to the field you wish to update
- 3. Update the information
- 4. Review the information. Repeat for all details you wish to update.
- 5. Click **NEXT**

Audience

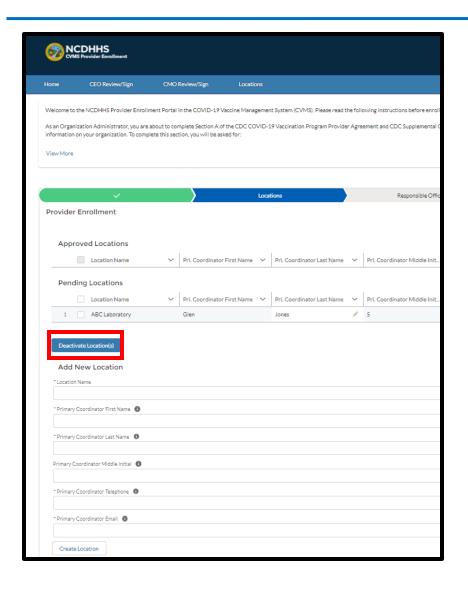
Organization Administrator

Tips

If you wish to manage your location(s) details after submitting Section A, review the CVMS Provider Enrollment Account Management User Guide located at CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19.



Step 6 of 9: Deactivate Your Location(s)



After adding a location, you can deactivate location(s). If you wish you manage your location(s) details after submitting Section A, review the CVMS Provider Enrollment Location Management User Guide.

- 1. Locate the **LOCATION** you wish to deactivate
- 2. Select the **CHECKBOX** for one or more locations
- 3. Review the locations you have selected to deactivate
- 4. Click the **DEACTIVATE LOCATION(S)** button
- 5. Click **NEXT**

Audience

Organization Administrator

Tips

Click **Previous** if you need to go back and edit a location.



Step 7 of 9: Complete CMO Information

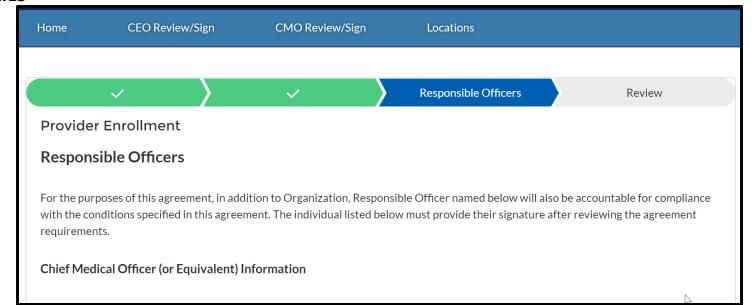
After adding your locations, you will enter your **CHIEF MEDICAL OFFICER** (CMO) Information on the Responsible Officers page.

At the bottom, you will see the box **SEND REQUEST FOR SIGNATURE NOW** checkbox. This will immediately generate an email to the CMO requesting their review and approval. **WE RECOMMEND THAT YOU DO NOT SELECT THIS BOX AT THIS TIME.**

If you do not select this checkbox, the CMO will receive an email once all Vaccine Coordinators submit the Section B flow for their location. This way, they review and sign the complete agreement at one time.

1. Enter ALL CMO DETAILS

2. Click **NEXT**







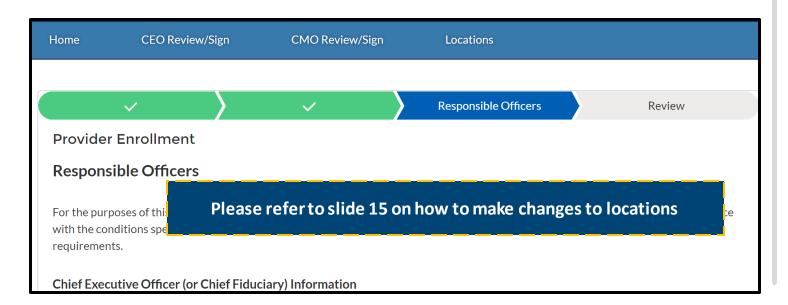
Step 8 of 9: Complete CEO Information

After entering the CMO details, you will be directed to enter your **CHIEF EXECUTIVE OFFICER** (CEO) Information on the Responsible Officers page.

You will see the same **SEND REQUEST FOR SIGNATURE** checkbox. This will immediately generate an email to the CEO requesting their approval and signature. **WE RECOMMEND THAT YOU DO NOT SELECT THIS BOX AT THIS TIME.**

If you do not select this checkbox, the CEO will receive an email once all Vaccine Coordinators submit the Section B flow for their location. This way, they review and sign the complete agreement at one time.

1. Enter ALL CEO DETAILS







Step 9 of 9: Complete Section A

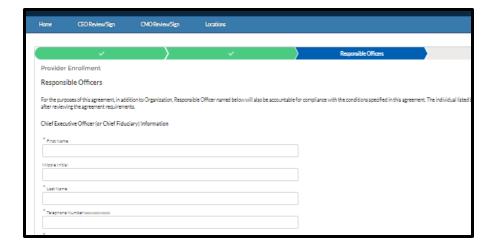
Once all CEO details are entered, you are ready to **COMPLETE SECTION A**.

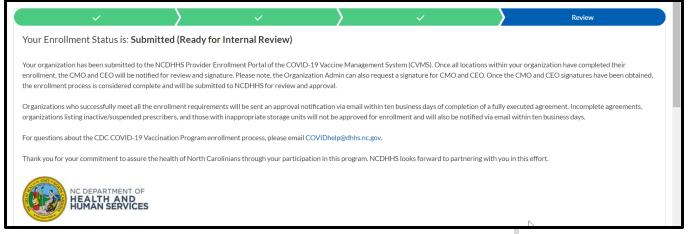
If you need to make any changes before completing Section A, use the **PREVIOUS BUTTON** to go back and

MAKE UPDATES.

After submitting Section A, you will see that your **ENROLLMENT STATUS** is **SUBMITTED.**

- 1. Confirm that **DETAILS ARE CORRECT**
- 2. Once the CEO page is complete, click **NEXT**
- 3. You will be directed to the SUBMISSION PAGE







Audience

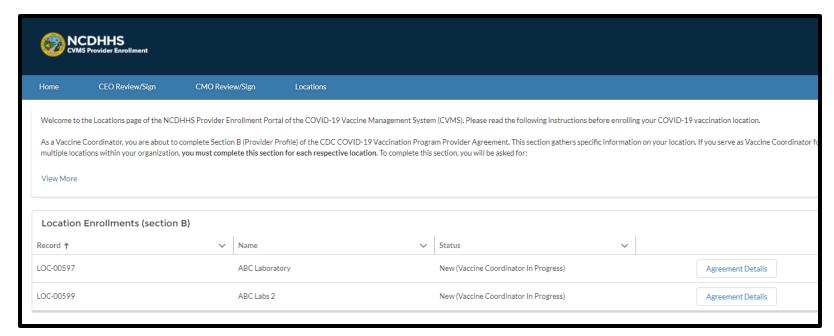
Steps After Completing Section A



Primary Vaccine Coordinator – Section B

If you are also the **PRIMARY VACCINE COORDINATOR** for the location in your organization, you can now begin Section B of the Provider Enrollment process.

For more guidance on how to complete Section B of the Provider Enrollment Process, please review **CVMS Provider Enrollment Vaccine Coordinator User Guide,** which is located on the NC Immunization Branch website: <u>CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19</u>.



Audience

Organization Administrator

Vaccine Coordinator

Tips

Review Slide 7 for details on activities each Role must complete in the Provider Enrollment Process.

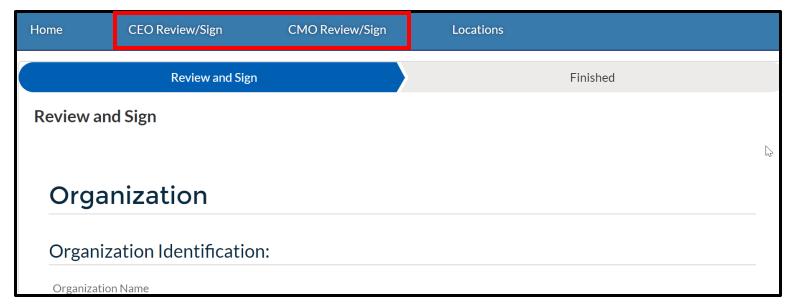


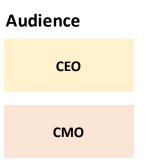
CMO & CEO – Review & Sign the CDC COVID-19 Vaccination Program Provider Agreement

If you are also the CMO and / or CEO for your organization, you can now review and sign the CDC COVID-19 Vaccination Program Provider Agreement and the CDC Supplemental COVID-19 Vaccine Redistribution Agreement, if applicable.

For more guidance on how to complete these steps, please review **CVMS Provider Enrollment Responsible Officer User Guide**, which is located on the NC Immunization Branch website: <u>CVMS User Guides</u>, <u>Recorded</u>

<u>Trainings and Upcoming Trainings | NC DHHS COVID-19</u>





Tips

Review Slide 7 for details on activities each Role must complete in the Provider Enrollment Process.



Organization Registration Status Notification

You will receive an **EMAIL NOTIFICATION** once the status of your organization changes to **APPROVED** or **REJECTED**. Rejected statuses will generate an email with the **REASON FOR REJECTION**.

Your organization can be approved after at least one location is approved and your Responsible Officer signatures have been captured. If your organization is approved prior to all locations being approved, please coordinate with the Primary Vaccine Coordinators to ensure completion of Section B for remaining locations.

Dear COVID-19 Vaccine Provider Applicant,

This memo confirms your enrollment in the Centers for Disease Control and Prevention (CDC) COVID-19 Vaccination Program in North Carolina and provides next steps for activation in the COVID-19 Vaccine Management System (CVMS). Your CDC COVID-19 Vaccination Program Provider Agreement and Provider Profile have been reviewed and accepted. Now that you have enrolled, you can complete the activation process in CVMS. You do not have access to CVMS until you are enrolled AND you complete the activation process. CVMS activation is required for all sites that will receive COVID-19 vaccine (either as direct allocation or transferred vaccine from another enrolled provider) but does not guarantee vaccine availability. If you have already started the activation process, please use the steps below to complete activation.

As a reminder, provider Agreement. Below is a summary of the information you provided and the status of each location:

Number of Locations requested: 2.

Number of Locations approved: 1.

Number of Locations rejected: 0.

Number of Practicing Providers requested: 1

Number of Practicing Providers approved: 1

Number of Practicing Providers rejected: 0.

Please ensure that any changes to Section B of your CDC COVID-19 Vaccination Program Provider Agreement and Provider Profile are updated in within 30 days. If there is a change to the signing Chief Medical Officer (or equivalent) and/or Chief Executive (or Fiduciary) Officer, the North Carolina Immunization Branch must be notified immediately by submitting a ticket to the CVMS Help Desk Portal (see instructions for registering below) and a new agreement must be issued.

Directions for CVMS Help Desk Portal Registration

Before you can submit a help desk ticket, you must register for an account within the CVMS Help Desk Portal, following the below instructions:

1. Visit the CVMS Help Desk Portal

Audience

Organization Administrator

Tips

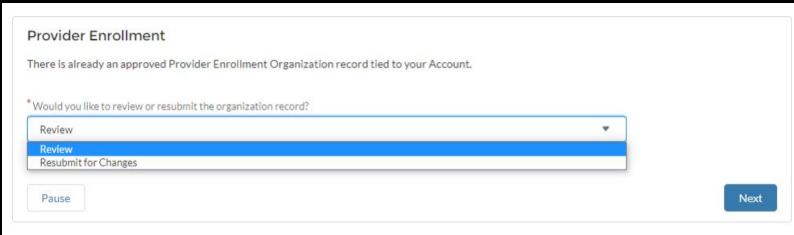
Check the spam/junk folder if an email is not received. Emails will be sent from the CVMS Enrollment team.



Update Section A After Submission

You will be able to **UPDATE SECTION A** after your organization's provider enrollment agreement has been approved. It is important to know that if you **RESUBMIT SECTION A**, your **CEO AND CMO WILL BE REQUIRED TO SIGN AGAIN** the CDC COVID-19 Vaccination Program Provider Agreement and the CDC Supplemental COVID-19 Vaccine Redistribution Agreement, if applicable. Your **ORGANIZATION** will also have to be **REAPPROVED**.

- 1. Log into the CVMS PROVIDER ENROLLMENT PORTAL
- 2. If you want to REVIEW THE STATUS of your Provider Enrollment Agreement, SELECT REVIEW
- 3. If you want to MAKE UPDATES, select RESUBMIT FOR CHANGES







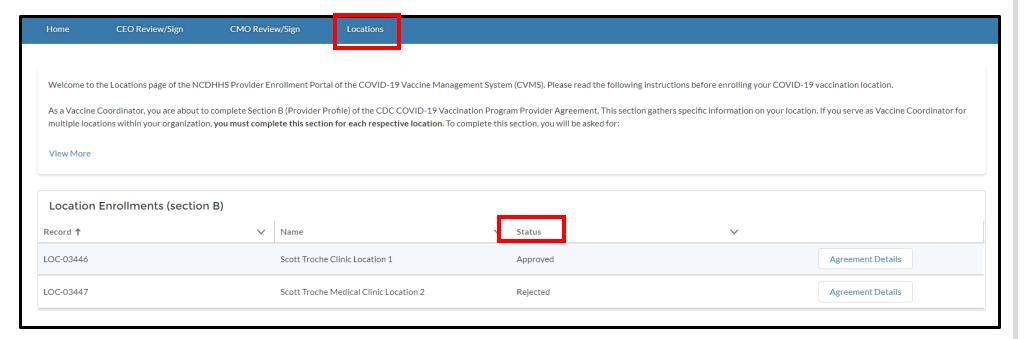
Checking the Registration Status of a Location



Step 1 of 2: How to check Provider Enrollment Location Registration Status

You will be able to review the registration status for each location within your organization. Please work with your Primary Vaccine Coordinators to complete your Provider Enrollment registration.

- 1. From your home page, click **LOCATIONS**
- 2. Review the **STATUS** for each location

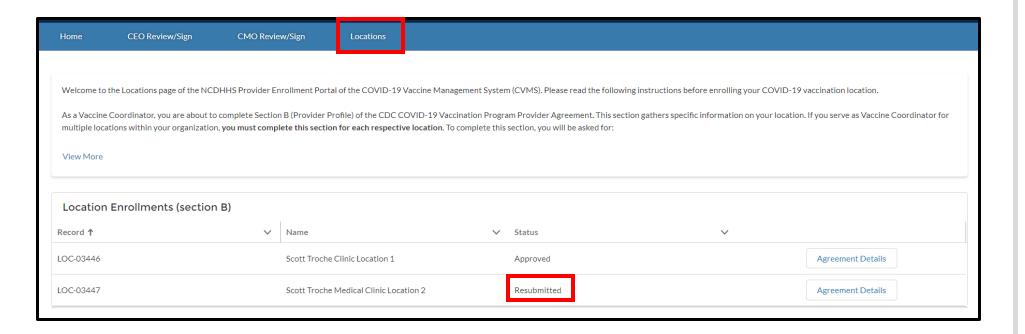






Step 2 of 2: Provider Enrollment Location Resubmitted Status

You will be able to see when a Primary Vaccine Coordinator has RESUBMITTED their Section B after rejection or approval.



Audience

Organization Administrator

Tips

When a location is rejected, you will be copied on the email to the Primary Vaccine Coordinator.



Appendix



Organization Status Notification

The Organization Administrator, CEO, and CMO will receive an **EMAIL NOTIFICATION** once the status of the organization changes to **APPROVED** or **REJECTED**. Rejected statuses will generate an email with the **REASON FOR REJECTION**.

Dear COVID-19 Vaccine Provider Applicant,

This memo confirms your enrollment in the Centers for Disease Control and Prevention (CDC) COVID-19 Vaccination Program in North Carolina and provides next steps for activation in the COVID-19 Vaccine Management System (CVMS). Your CDC COVID-19 Vaccination Program Provider Agreement and Provider Profile have been reviewed and accepted. Now that you have enrolled, you can complete the activation process in CVMS. You do not have access to CVMS until you are enrolled AND you complete the activation process. CVMS activation is required for all sites that will receive COVID-19 vaccine (either as direct allocation or transferred vaccine from another enrolled provider) but does not guarantee vaccine availability. If you have already started the activation process, please use the steps below to complete activation.

As a reminder, providers must be able to meet all participation requirements outlined in Section A of the CDC COVID-19 Vaccination Program Provider Agreement. Below is a summary of the information you provided and the status of each location:

Number of Locations requested: 2.

Number of Locations approved: 1.

Number of Locations rejected: 0.

Number of Practicing Providers requested: 1

Number of Practicing Providers approved: 1

Number of Practicing Providers rejected: 0.

Please ensure that any changes to Section B of your CDC COVID-19 Vaccination Program Provider Agreement and Provider Profile are updated in within 30 days. If there is a change to the signing Chief Medical Officer (or equivalent) and/or Chief Executive (or Fiduciary) Officer, the North Carolina Immunization Branch must be notified immediately by submitting a ticket to the CVMS Help Desk Portal (see instructions for registering below) and a new agreement must be issued.

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1. Visit the CVMS Help Desk Portal

Audience

Organization Administrator

CEO

CMO



Additional Notes

Key Items:

- Hyperlinks appear as light blue and will provide additional information or navigation.
- * Asterisks are used to denote required information.
- A Toggle can be clicked to see selectable options.
- A Pen can be clicked to make edits to the field.
- Previous Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.
- Pause A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browser to access CVMS.
- For more details on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.



User Guide Change Log

Key Items:

• Date of Change: Date that any updates were made to the User Guide

• Changes Made: Summary of the updates made within the User Guide

Impacted Slides: Specific slides that were updated or changed

• Author: The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/10/2020	Original version		Kevin Kauffman
2	12/31/2020	Removed link to the Provider Enrollment portal	4, 6	Simon Couderc
3	1/8/2021	 Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information. 	1, 2, 8, 21, 26, 27	Courtney Seward
4	1/13/2021	Replaced screenshots with updated Provider Enrollment Portal branding	12, 15, 16, 23	Kechia Scott
5	2/11/2021	Took out any mention of the covidhelp email	21, 26	Courtney Seward
6	3/9/2021	Updated organization approval requirements	17-18 , 21, 25-27, 29	Azalea Troche

